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The Presidents' Forecast

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JULY

MR. ED KIANKA
CONGRESSIONAL INFORMATION SVC
4520 EAST WEST HIGHWAY
BETHESDA, MD 20814

DECEMBER

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OCTOBER

MBER

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NATIONALREGIONALITY



Zellerbach Delivers Value!

There is one distribution group in the industry that has been delivering value to its customers and to its vendors for over one hundred and fifteen years. A distribution group that has consistently, consecutively and profitably delivered the best products and services to market. It is the Zellerbach Paper Group, the one distribution network with **nationalregionality**—the service orientation and responsiveness of a regional distributor backed by the resources and strength of a national organization.

The Zellerbach Paper Group is three fine distribution companies—Southern Paper Company, Virginia Paper

Company and Zellerbach Paper Company—and it is two separate businesses—a printing paper merchant and an industrial distributor. It is 3000 distribution specialists delivering value to printing paper and industrial customers from coast to coast.

Three companies...two businesses...one national organization. If you are looking for profitability and growth through added value delivered at market, there is one distribution group that offers you **nationalregionality** and a 115 year proven track record.

 **Zellerbach**
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PRINTING PAPER BUSINESS UNIT

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—Fine Papers

—Weaver Paper Company

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ZELLERBACH PAPER COMPANY

INDUSTRIAL BUSINESS UNIT

ZELLERBACH PAPER COMPANY

AGRICULTURAL SALES GROUP

ZELLPACK PACKAGING GROUP



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Paper Merchant Sales Report

Cover Photo: Richard Chesnut

GOLDSMITH DEALS CROWN ZELLERBACH TO JAMES RIVER

James River Corp. will acquire majority ownership of Crown Zellerbach and British financier Sir James Goldsmith would buy most of three businesses spun off from Crown.

In the arrangement announced, Goldsmith would buy most of the stock in the three forest products parts of the company while James River would purchase the paper operations of Crown Zellerbach.

Goldsmith, who owns just over 50% of Crown's stock would receive \$90 million in cash and control of the three new companies.

UNION CAMP REORGANIZES

Union Camp Corporation has promoted two officers to the post of executive vice president as part of a reorganization focusing on the company's three major

product areas: packaging, fine papers and chemicals. The move also is designed to consolidate Union Camp's financial and strategic planning functions.

James M. Piette was named the senior executive vice president of the newly formed Packaging Group. Robert L. Webb was appointed senior executive vice president of Union Camp's Chemical Group.

"We intend to be responsive marketers and to develop innovative products that meet the needs of our customers in their marketplaces," said R.E. Cartledge, president and COO of Union Camp.

CENTURY PAPERS SAYS EARNINGS OFF

Century Papers, Inc. of Houston, TX, announced unaudited net earnings for the six months ended September 30, 1985, that, although sales had increased by 51.8%, earnings had dropped 11%. Earnings on the past half were \$377,000 on sales of \$63 million, compared with earnings of \$424,000 on sales of \$41.5 million for the same period a year ago.

Herschel G. Maltz, president and CEO,

said, "This six months' earnings performance is evidence of statements we have made in the past that addressed the general condition of the wholesale paper and chemical distribution business."

According to the wholesale distributor of paper and allied sanitary maintenance products, the past six months have been the most difficult the company has experienced in 50 years in terms of marketing, Mr Maltz added. "We now see some small indication of improvements in these markets, and once this does in fact occur, our earnings should materially improve."

PERFECT PAPER ANNOUNCES NEW MERCHANT PROGRAM

Now, paper merchants can sell a first-line, mill-guaranteed offset enamel at highly competitive prices without increasing their present inventory. "Supreme Gloss," Perfect Paper's new stock will be available in standard text and cover weight, and marketed exclusively through merchants.

"The merchant will not have to carry the capital cost of a big inventory," said president of Perfect Paper Company Joseph H. Merback, "because we maintain a \$1 million inventory in our Philadelphia and Atlanta warehouses and we can deliver a skid or carload to him or his customers as quickly as overnight."

GOULD ACQUIRES OLYMPIC PAPER

The Gould Paper Corporation announced its acquisition of Olympic Paper Co. Inc. Olympic will operate as a separate subsidiary of Gould, with its two former owners, Al Siegel and Gary Zipper, continuing with the company.

The acquisition continues to make Gould the largest printing-paper distributor in the New York metropolitan area; with a sales volume now approaching \$200 million.



The 1985 Paper/Plastics & Allied Products Exposition was a great success because of companies like Fabian Taping Dispenser Corporation of New York City. John Buckley, president of the National Paper Trade Association (L) congratulates Moe Fabian for participating in his 50th consecutive show.

PROFESSIONS UNLIMITED, INC.

The Recruiting Specialists...

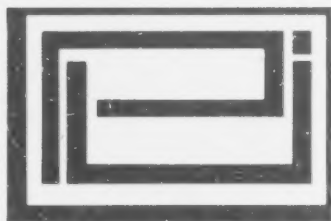
Executive management of paper merchant houses know where to turn when they need help in filling important positions. Specializing in sales, middle management and top executive positions, Professions Unlimited can tailor a search program to meet your needs.



Professions Unlimited is a 13 year old recruiting firm specializing in the paper distribution industry with emphasis on flexible packaging, fine paper and industrial supplies. Professions has placed over 100 people in these areas since 1981—from New York to California, Minnesota to Florida. 80% of those placed were experienced in the paper merchant trade, the remainder were from manufacturers serving paper merchants.

To find out how you or your firm can benefit from our services contact Carl Coco, Jr., CPC, Executive Vice President or Philip R. Gross, CPC, Vice President National Accounts.

PROFESSIONS



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*Please note: Our policy states that we only work with one merchant house per city.

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CHAMPION SELLS PACKAGING BUSINESSES TO STONE

Champion International Corporation and Stone Container Corporation have announced a definitive agreement for the sale of most of Champion's packaging businesses to Stone. The \$450 to \$475 million sale, which includes Stone common stocks and warrants, is subject to certain conditions, including approval by Stone shareholders.

The operations acquired by Stone from Champion have an approximate annual sales volume of \$800 million and employ about 7,000 people. After the sale, Champion will continue to operate one linerboard and kraft paper mill and a retail packaging plant.

The sale of these packaging operations significantly enhances Champion's divestiture program to reduce the debt

incurred in its late-1984 acquisition of St. Regis Corporation and to focus growth in its key pulp and paper businesses.

CHATFIELD MOVES INTO BOSTON

The Chatfield Paper Company, a distributor of printing, business and industrial paper products that is part of the Butler Paper Company, has opened a distribution facility to serve the Boston metropolitan area.

"Our new Boston location is a demonstration of our commitment to growth in New England," said Alan E. Lang, vice president of the Butler Paper Company. "The printing industry in Massachusetts is vital and active, and can easily support another distributor that offers quality lines and professional service."

The new Boston branch, which will be managed by William J. Hahn, will house

sales representatives, customer service specialists and warehouse and trucking personnel.

The growing Butler Paper organization, which is part of Great Northern Nekoosa, posted \$530 million in sales for the first three quarters of 1985.

RIS HOLDS ANNUAL PAPER SHOW

Over 650 designers and printers jammed the JFK Library on the Boston Campus of the University of Massachusetts for the 8th annual Ris Paper Show, recognized as the largest of its kind.

The Ris Paper Company, one of the nation's leading independent distributors of fine papers, also played host to The Mead Top Sixty Winners, which honored book, brochures, and other printed material from across the country.

"Ris Paper prides itself on the ability of its skilled promotion advisers to help

**WHAT WOULD YOU CALL A PRODUCT
THAT DRAWS NEW BUSINESS
FROM YOUR OLD CUSTOMERS?**

make the designer's job more creative and hassle-free," said Richard C. Rogers, president of Ris Paper's New England division.

HUDSON CITY PAPER MOVES TO NEW OFFICES

The Hudson City Paper Company has moved to their new offices and warehouse in West Caldwell, NJ. The building is more than double the square foot area of the company's previous location in Wallington, NJ.

President Kent Westhelle said, "Our new facility is a milestone in our 23 year history. It is a tribute to our loyal customers and friends."

Hudson: a printing, writing and envelope distributor, serves the New Jersey/Metro New York graphic arts industry.

MN TO BENEFIT MRA MEMBERS

Management News, the official monthly magazine of the National Paper Trade Association, inc., will be informing the Manufacturers Representatives of America, Inc. From now on, all of MRA's 200-plus members will receive *MN* as an added membership benefit through a special arrangement with NPTA.

The MRA board believes that *MN* will be a helpful business tool for all its members, regardless of individual involvement in the paper industry.

ISSA HOSTS ANNUAL TRADE SHOW

The International Sanitary Supply Association, Inc. sponsored the organization's 62nd Annual Educational

Conference and Merchandise Exhibition, "Clean Getaway '85," October 16th through the 19th. The trade show drew 10,004 executives from 2,735 companies, and was the largest the association has ever run.

This year, American Airlines was the recipient of the Association's "Fifth Annual Cleaner World Award," for the airline's "AAdvantage Liberty Club" program, which aims to raise \$5 million dollars to be dedicated to the restoration of the Statue of Liberty.

NEW HEADQUARTERS FOR MEAD CONTAINERS

Mead Containers, a division of the Mead Corporation, has announced that it will move its headquarters to Atlanta, GA. The office, located at 950 West Marietta Street, will house approximately 20 people when it is completed.

The easiest way to get business is from customers you already have. And Marvel makes it easier than ever.

Not only because your customers need light bulbs, but because Marvel long-life lamps have big advantages over ordinary bulbs:

- They cost less.
- They last twice as long.

Benefits that would light up any customer's eyes. What's more, they're sold only through distributors. So you never have to worry about price cuts at the retail level.



Marvel has a full line of long-life incandescents, fluorescents, special-colored fluorescents, quartz, mercury vapors and high sodium lamps. Lamps in every size and shape to get your business in its best shape ever.

If you still haven't found out how Marvel can get you new business, call toll-free (800) 845-6421. We'll be glad to show you

the light. Made in the U.S. by:
MARVEL LIGHTING CORPORATION
(An American Brand Company),
222 Bridge Plaza South, Fort Lee, NJ 07024

A MARVEL

The move puts Mead Containers closer to the geographic center of its markets and manufacturing plants, most noticeably a plant it operates at Mead's Marietta Street complex. The division currently operates 14 corrugated container plants, primarily in the Southeast and the Midwest.

PAPER MANUFACTURING WAGE INCREASES DOWN

The paper manufacturing industry's national negotiated first year wage increase for the first 11 months of 1985 is 2.4%, compared with 3.8% at this time last year, according to the American Paper Institute. Among all manufacturers, the figure is 4.0%, down from 4.4% in the first nine months of this year.

The "All Industries" median negotiated first year wage increase for the first nine months of 1985 is 3.9%, compared with 3.8% at this time last year, reports the Bureau of National Affairs.

PEOPLE IN THE NEWS

Steve Anmuth director of paper purchasing and customer service for the S. Walter Packaging Corporation, was recently elected president of the Philadelphia Paper and Cordage Association at their annual meeting.

Neal Freel has been appointed regional administrator of WWF Paper Corporation. Jack G. Goldberg has been appointed vice president of Regal Envelope, a division of WWF Paper Corporation. Edward M. Bishop, vice president-book publishing of WWF, died after a short illness.

Ray S. Ferguson has been named the president of Schwartz Paper Company, Inc. Lowell Pequignot has been appointed executive vice president of Schwartz Paper Company, Inc.

Don Houtkooper has been named manager of financial reporting for the Butler Paper Company. John Toevs has been appointed manager of costs and

PAPER DISTRIBUTION INDUSTRY BEST SELLERS

Rank	Publication	Last Month
1	Industrial Paper Merchant Sales Compensation. <i>NPTA</i> . \$40	1
2	NPTA Vacation Schedules (Planning Folders). <i>NPTA</i> . \$40 each	—
3	Merchandising To Maximize Your Margins. <i>VanDeMark</i> . \$21.60	4
4	Wholesaler Inventory Control. <i>VanDeMark</i> . \$23.60	3
5	Practical Handbook of Distribution/Customer Service. <i>Blanding</i> . \$40	2
6	Measuring Customer and Product Line Profitability. <i>Mullins</i> . \$35	5
7	Branching and Market Coverage. <i>Healy</i> . \$35	6
8	What Really Helps (or Hurts) Your Company's Bottom Line. <i>Tape and Guide</i> . \$50	7
9	Strategic Planning: A Fitness Program For Distributors. <i>Norris, Garrett, Samek</i> . \$35	8
10	Harvest the Fruits of Paper Selection (Marketing Tool). <i>NPTA</i> . \$50 each	—

ALL PUBLICATIONS ARE AVAILABLE FROM NPTA

budget for Butler. Rusty Staff has been named regional controller-distributor of Butler Paper's central region.

John H. Oakley has been appointed to the newly created position of vice president-marketing, industrial products for the Paper Corporation of America.

James J. Hughes has been named branch manager of Virginia Paper Company's Virginia Beach, VA facility.

Charlie Cobb, of Merchant Sales Company has been named "Salesman of the Year" of the Freeman Paper Company.

Jack Steindler president of Steindler Paper Company, has announced his intention to retire.

Richard "Dick" Abrams, founder of the West Coast Paper Company, recently passed away.

Frank Driscoll has been appointed vice president, sales of the James River Corporation's Massachusetts Papermaking Division.

John W. Turner has been named chairman and CEO of Appleton Papers, Inc. Dale H. Schumaker has been appointed president and COO of Appleton Papers, Inc.

David M. Dooley has been promoted to vice president, domestic sales of Lily-Tulip, Inc.

Carol Galford has been named sales

and marketing manager, professional products division of Marcal Paper Mills, Inc.

Harold R. Hoss treasurer of Union Camp, has been appointed vice president. Robert E. Moore has been named a vice president of Union Camp in addition to being comptroller of the company. William G. Stewart, head of materials and distribution, has also been made a vice president of Union Camp.

Info Welcome

News items appearing in *MN* magazine are provided to the editorial staff by paper merchants, manufacturers, converters, consultants and other associations. News about trends, market changes, key personnel, new technology, and special events are always an important part of these pages.

Those interested in seeing their material included in the Industry News section of *Management News* should forward their materials to: William H. Frohlich, editor, *NPTA Management News* magazine, 111 Great Neck Road, Great Neck, NY 11021.

PRINTING PAPER

ADVERTISING INVESTMENT

"Advertising expenditures in newspaper for 1985 will total \$25.9 billion," said Craig Standen, president of the Newspaper Advertising Bureau (NAB). He went on to predict gains of 7% in national, 9% in retail and at least 10% in classified advertising over 1984.

Newspaper advertising is no longer just black and white. The influx of color on regular pages comes as a result of improvements in printing technology. As a part of the advertising growth is the great increase in advertising supplements. Four color advertising on coated and supercalendared papers have come on strong in 1985.

NAB is planning a "Future of Advertising" project that will study such developments and make long-range assessments for newspaper publishers.

PRINTING INDUSTRY MAGAZINE OF THE YEAR

The International Association of Printing House Craftsmen have selected *American Printer* magazine as the "Magazine of the Year." The magazine is published by Maclean Hunter Publications Corporation.

NEW REPORT TRACKS PERFORMANCE OF WORLD FOREST PRODUCTS COMPANIES

"Financial Performance of the World Forest Industry Companies 1975-1984" is the title of a new report just published

by the Jaakko-Poyry Group of Helsinki, Finland. It profiles 10 years of financial results for 163 companies in 12 Western countries.

All 163 companies included in the report are ranked on seven different measures of performance. One of those measures, Gross Profit on Sales, is contained in this article.

During the 10 years covered in the report, the world's forest industries saw considerable recovery at the end of that period. Production levels showed dramatic increases and profitability improved. As a result, many companies increased their capital spending: Germany and Sweden doubled their investment; the United States, Finland and the United Kingdom added 25%. Canada, on the other hand, which suffered due to rapid cost escalation and strong currency, de-

creased its investments by 71% from 1980 levels.

"Measured by their average return on total assets or return on equity," the report concluded, "most of the top 10 companies were U.S.-based." No U.S. companies appeared at the bottom end of the key performance rankings. The least profitable companies, in general, were from Western Europe and Scandinavia.

By product segment, the companies that led the way in performance were the producers of the printing and writing paper grades. "Coated papers have experienced the biggest investment, driven by the high world demand for these grades," the report stated.

For a full prospectus on the study, contact Norman Wiener, VP, Walker Wiener Associates, 190 North State Road, Briarcliff Manor, NY 10510.

MOST PROFITABLE FOREST PRODUCTS COMPANIES —FIVE YEAR AVERAGE RESULTS (1980-1984)

GROSS PROFIT ON SALES

RANK	COUNTRY	COMPANY	%
1	Sweden	Gräningsverken	34.2
2	U.S.A.	Fort Howard	32.3
3	Finland	Metsä-Botnia	28.8
4	Canada	Donohue	27.7
5	Finland	Kaukas	24.5
6	Sweden	Nymolla	23.6
7	Sweden	Hylte Bruk	21.3
8	U.S.A.	Consolidated Papers	21.1
9	Norway	Follum Fabrikker	20.1
10	Switzerland	Holzstoff	20.1

LEAST PROFITABLE

154	Canada	Weldwood of Canada	4.5
155	France	Aussedat Rey	4.5
156	Canada	Rolland Inc.	3.8
157	Canada	Normick Perron	3.5
158	Great Britain	Olives Paper Mill	2.4
159	France	La Rochette Cenpa	0.9
160	Sweden	Wifstavarf (1)	0.6
161	Norway	A/S Star Paper Mill (2)	-1.3
162	Belgium	Intermills S.A. (2)	-8.3
163	Great Britain	Thames Board Ltd. (3)	-8.5

- 1) Two-year average (1983-84)
2) Three-year average (1980-82)
3) Four-year average (1980-83)

SOURCE: Financial Performance of Forest Based Industry/Jaakko Poyry (Helsinki, Finland)

MAGAZINE FOR CORPORATE PUBLISHERS STARTS

The Maclean Hunter Publishing Company, reacting to the growth of information-based businesses, has announced the formation of a new magazine: *EP & P '86, The Magazine For Electronic Publishing and Printing Professionals*.

The new publication will serve the specialized needs of corporate publishers. Elizabeth G. Berglund, publisher, elaborated on the unique market: "Corporate electronic publishing is distinguished from commercial printing and publishing in that the organization's main business is not printing."

Any organization that utilizes internal electronic means to create and prepare print and video materials for documents, business communication, advertising and promotion among others would be considered potential members of EP & P's market.

INDUSTRIAL PAPER

GROCERY STORE SALES UP

According to a report in the September issue of *Supermarket Business Magazine*, the consumption of paper cups and plates as a percentage of the dollar amount spent in grocery stores grew slightly from 1983 to 1984. Paper cup sales grew from \$269 million in 1983 to \$276 million in 1984.

Paper plate sales rose from \$372 million to \$392 million. These figures represent increases in sales of paper cups and plates of 2.4% and 5.5% respectively when compared with total sales at grocery stores. The increase in total domestic consumption, which includes farm

goods, increased 2.2% for paper cups and 4.9% for paper plates.

LITTER TAX PROPOSED IN PENNSYLVANIA

The Keystone Solid Waste Council has proposed an alternative to the Pennsylvania Beautification Fund which would impose a 1/20-cent tax on disposable containers used in takeout foodservice in the state. The council, which represents Pennsylvania's beer, soft drink, aluminum, and steel industries as well as food merchants and organized labor,

decided on provisions of the proposed legislation at a meeting in Harrisburg, PA.

The alternative imposes on manufacturers, wholesalers, distributors and retailers of litter-generating products a tax of 3/100 of one percent (.003) on sales in Pennsylvania. The first \$100,000 in annual retail sales would be exempt from the tax and the maximum tax any one company would pay would be \$30,000.

Meanwhile, the Pennsylvania Beautification Fund Law is being set into its final form. The proposed legislation was written and co-sponsored by Representative Benjamin Wilson (R-Montgomery County).

ITEMS A PACKAGE ENGINEER HAS TO CONSIDER WHEN DESIGNING A PACKAGE

1. What are our customers' needs?
2. What market are we selling?
(Auto-Cosmetic-Industrial-Retail, etc.)
3. What is Target Selling Price—Package Cost?
4. Package Quantity—number per inner box and number per shipper?
5. Does packaging remain with product until it is used up?
6. If so, should a dispensing feature be designed into package?
7. Start up and anticipated volume?
8. Could larger volume be automated?
9. What are the physical considerations? How stocked? Temperature? Shelf life? Product's desirable properties?
10. Is it a hazardous material?
11. What is competition doing?
12. What plant is going to manufacture? Do they have the equipment?
13. Is material a single source item?
14. Can supply be purchased in low volume?
15. Can die, plate, mold, separation costs, etc., if required be cost justified?
16. Can volume justify printing preparation costs?
17. Will package be printed or labeled? Does design make it difficult to label or provide copy space?
18. How much weight will package add for shipping and handling costs?
19. Size limitations considered? Too wide so dealers won't put it on their shelves? Is it shaped so it is convenient, practical and easy to handle?
20. Can contents be completely emptied?
21. Present inventory. Too small causing a rush or too large causing excessive scrap.
22. Would change in style make better use of warehouse and trailer space?
23. Is an easy open feature desirable?
- Tamper Evident Packaging**
24. How easily and quickly can the package be opened?
25. How easily and effectively can the package be resealed?
26. Should it be childproof? How about an arthritic alternate?



What is on the paper merchant's calendar for 1986? *MV* asked the members of the NPTA board of directors for their thoughts about the year they face. Their candid reports show that 1986 will not be easy for many. But hidden behind its rough exterior are many opportunities for the merchant that heeds the signs.

Steady Growth in 1986: Especially for Market-Segment Merchants

*by Frederick J. Stabbert, president
Zellerbach Paper Company
San Ramon, CA*

In the Zellerbach Paper Group we believe 1986 will be a year of modest economic growth, with inflation remaining at relatively low levels, approximately 2 to 3%. Even though it is an election year, we do not expect the general economy to improve dramatically. Rather, specific market segments or niches will have the best opportunity for above-average growth, and as a result, those merchants that are market-

The Presidents' Forecast

segment focused will perform better than general-line distributors.

Products are expected to be in free supply with continued pressure upon domestic manufacturers from foreign sources, particularly in coated papers, plastic bags and film. Foreign manufacturers will continue to seek additional distribution channels for their other product lines.

Merchant consolidations will continue. The quality of the merchants' value-added services, those provided to both customer and supplier alike, will continue to differentiate merchant performance. Trading margins will continue under pressure, with the price/service differential remaining narrow due to modest real economic growth coupled with product availability.



Frederick J. Stabbert

Interest rates are expected to remain near current levels with continued improvements in the management of working capital as an important performance leverage point.

In summary, 1986 will be characterized as a year of steady growth rather than the spectacular results we had seen during the last election year, 1984, or the modest improvements of 1985.



Ronald N. Carter

We Can Only Steel Ourselves for the Unknown and Plan Accordingly

*by Ronald N. Carter, president
Supply/Service, inc.
St. Louis, MO*

Planning for 1986 is the most challenging activity we have been engaged in for the last several months. Certainly, the greatest and most obscure factor in 1986 projections is the Federal Government, by the actions of its many components.

Admire the fire and smoke belching out of Washington, DC, we find some heat (usually in the form of partisanship for one cause or another) but, unfortunately, very little light. We are left in the dark about how much the government may cut spending—indeed we don't know if the politicians will truly cut spending, or just switch more to "Off Budget" items. We don't know what tax laws or rules we will be operating under. We can only steel ourselves for the unknown and plan accordingly.

We project tighter money and credit policies as margins may well be pressured from unknown factors. We want to be able to stay in business rather than be forced out by factors over which we have no control. The current chaos in both the banking industry and the savings and loan industry—businesses that should be the heart and soul of sound, conservative entrepreneurship—is a debacle produced by the pursuit of hoped-for profits, illustrating that one is well advised to look carefully at the deployment of assets into questionable inventory or receivables.

As taxes (property, Social Security, state and federal employment), insurance (liability, comprehensive, employment, product liability) and employment costs (direct, benefits) all rise, we strive to analyze our business to be

cognizant of their impact on our margins. We review our product mix, sources and methodology of purchasing, warehousing, marketing and delivery, with an eye toward their impact on net profit.

We are committed to professionalism. Our people are encouraged to improve their skills so they may do a better job and be of greater value in the company and better qualified for advancement within our organization. In the last two years 12 of our sales people have gone through a week-long training program at the factory of one supplier—plus other seminars and courses for both sales and staff personnel. We constantly look for ways to better our customer base, both in service and products, to our existing accounts and new accounts we might serve through product line expansion.

1986 may well be the most significant year of the next several. Our government must act, one way or another, in many areas. The changes that will be produced in our economy will be profound and will be felt for many years. Even the reaction to those changes will be determined by what the government allows to happen. We are, as best we can, prepared for the unknown in as optimistic a manner as we know how to fashion.



Frank J. Viegas

New England will Replay 1985 this Year

*by Frank J. Viegas, president
The Dowd Company, inc.
Woburn, MA*

At the NPTA Convention in New York last October, we listened to 3M's economist, John McDevitt. His message was that if you liked 1985, that was good, because 1986 was shaping up to be much the same. We think that seems to be true in New England.

1985 saw the first slowdown in the high tech industry in New England. Some substantial quarterly losses were reported and several thousand people were laid off. The economy remained healthy despite this and people found work quickly because our unemployment rate did not rise.

New England finds itself in an unaccustomed role in recent years. The conversion of our economy from the traditional textile, shoe and leather base has been complete; and we are more balanced than before. We don't expect a significant upswing or downswing in 1986, but rather a steady increase in sales.

Business will get Tougher in 1986

*Jonathan O. Bloom, president
JB Papers, Inc.
Union, NJ*

With all the risks of forecasting the coming year, we must, both as individual businesses and an industry, try to determine what we will need to do in 1986 to survive and flourish. J B Papers plans to do both, by improving the way we execute the basics of selling, delivering and buying, and by trying to learn and innovate.

It appears the year will bring a continued overall weak demand for most printing grades, with some slow improvements during the year as the economy firms. Consequently, the price instabilities we have learned to cope with will probably continue and we hope for no strengthening of margins.

Therefore, we think we need even more urgently to differentiate ourselves from our competitors in the eyes of our markets. We will try to communicate to our customers and prospects what we can offer them that is both different from our competitors and more responsive to their needs in serving *their* customers.

To do this effectively, we will need to focus more precisely on market segments we want to serve and to devise distinctive services we can offer them. We think the risks of losing out to a competitor's innovation are far greater than the risks we run of innovating ourselves. I do not feel anyone in our industry has yet locked-up any particular market segments and that essentially all major opportunities are still open to the range of merchants in our industry. However, I am not sure this will continue indefinitely. We plan, therefore, to pick our segments and to hit them.

Within J B Papers, we try to understand our customers' true needs in each of those segments, and then make sure what we do serves those needs at a profit. In the coming year, as our customers' businesses change and as we focus more and more precisely, we will need to learn those new and shifting needs, and how those changes impact our gross trading margins and our net operating profits. We will, therefore, continue to invest in the training, equipment and management we will need for smarter, more sophisticated and—ultimately—more productive people in our company to deliver these cost-effective services.

Fundamentally, I think our business will get tougher, both in 1986 and long-term. That

means we will have to be smarter, faster and simply better every year. If nothing else, it won't be boring!

North Carolina's Economic Future Looks Bright

*by James B. Brame, Jr., president
Brame Specialty Company
Durham, NC*

My national economic outlook could best be described as cautious optimism. The conventional wisdom today seems to be that inflation is under control and that we've licked high interest rates. My memory is good enough to recall that what often has happened in our economy has totally contradicted what the generally accepted forecast dictated.

The potential volatility of interest and inflation rates prevents me from being totally comfortable with my otherwise positive economic outlook for 1986. The profit levels of many paper mills have been depressed. Were we to experience a rise in interest and inflation rates, these depressed profit levels would probably add to the volatility of the cost of paper in our industry.

On a more regional basis, we look for 1986 to be a good year. Though the future of several traditional industries in our area—textiles and tobacco—are uncertain, the state's economic future looks bright. Our state is growing; we continue to benefit from the influx of new people and companies. Our unemployment rate is extremely low, but the flip side of the low unemployment rate is that it is difficult to attract and hold good people.

As for our particular firm, we look forward to healthy growth in the coming year. Our optimism is due to several factors: 1. The growth of our area; 2. A continuing expansion of the geographical areas we serve; and 3. An unusual diversity of products we offer.

1986 should be a good year, but the big question about the economy will probably be with us through the year and into 1987.

Continued Investment in Training a Key

*by James J. Swearingen, exec. vice president
Paper Corporation of America
Valley Forge, PA*



Jonathan O. Bloom



James B. Brame, Jr.



James J. Swearingen



Richard A. Reeves



George T. Jewett

As we prepared for fiscal 1986, we made some basic assumptions regarding our markets as we see them. We are assuming a low growth, low inflation environment, and we are anticipating continued margin pressure in most every market and product segment.

Even after evaluating these conservative assumptions regarding the business climate, we remain confident that we will accomplish our objectives for the coming year. Our optimism is based on detailed plans we have laid out with respect to our internal programs and our marketing emphasis.

We feel this will be another year which will dictate very tight asset management, with particular emphasis on accounts receivable. The anticipation of continued margin pressure makes the need for expense control in all aspects of our business even more critical. We have developed effective cost containment programs and efficiencies over the years, and the need for greater productivity in all facets of our business will continue to be an area of primary focus. We have made our most dramatic improvements in the physical distribution side of our business.

One area in which we will not reduce our expenditures is that of training. We have developed specific internal programs to enhance the skill levels of company presidents, division managers, sales managers and sales representatives. The return on this investment of time and money has been excellent, and we will continue our involvement in 1986. When appropriate, we will participate in external programs to compliment our own efforts.

We will adhere to our long-range program involving our investment in data processing, and we feel we are prepared to meet the increased demands of our vast customer base. Concurrently, our improved data processing capabilities have placed us in a better position to manage our businesses.

Our ongoing program of market segmentation has enabled us to select the distribution segments in which we wish to grow. We have developed creative marketing programs to expand each of these market segments, and we are confident we will continue to progress in the coming year. We have made the investments necessary to broaden the scope of our converting business, and we expect to derive the benefits of these investments in 1986. Finally, we have planned significant expansion of our National Retail Store Program, and the future for this business looks very bright.

While we expect 1986 to be another difficult business year, we are optimistic about our ability to produce the desired results.

Emphasize Internal Programs to Improve Profitability this Year

*by Richard A. Reeves, vice president
Hammermill Paper Company
Erie, PA*

The business climate for our industry in 1986 will most likely be a continuation of 1985—ready availability of most products, and, therefore, a highly competitive marketplace for paper merchants. Gross trading margins will continue to be under pressure. Without the prospect of improved gross trading margins, merchants will have to emphasize internal programs to maintain and improve profitability. Programs to control expenses and improve productivity will receive considerable attention. Paper merchants have placed great emphasis on improved asset management in recent years, and this must obviously continue, primarily through the increasingly effective use of computerized systems.

However, in spite of a competitive marketplace in 1986, there will be opportunities for growth. Certain coated printing paper end-use markets, reprographics, computer papers, food service disposables, and specialized packaging materials, for example, will present such opportunities for fine paper and/or industrial merchants.

Thus, 1986 should be a good year—for those merchants who continue to operate efficiently, while effectively growing their businesses.

Our Industry is Undergoing Major Change

*by George T. Jewett, president
Mead Merchants/Chatfield Paper
Cincinnati, OH*

As we approach 1986, we look forward to some improvements in the economic outlook for our kind of business. We do not expect the economy to grow more than 3% to 4%. The important factor is that we should not be experiencing falling mill costs as we did in 1985.

I feel we have all learned to live without

inflation to a greater degree and are better able to control our costs. As a company involved in printing papers, industrial papers and packaging, we work with a broad cross-section of the business community. This helps to level out the supply and demand and economic variables customers' encounter.

There is no doubt that our business is going through major change. We are attempting to meet that change by having a cost-efficient distribution network serving a well-trained and market-focused sales force. Come on 1986—we are ready for you!

Gulf Coast States will be Stimulated by Falling Dollar

*by Herschel G. Maltz, president
Century Paper, Inc.
Houston, TX*

Despite uncertain prospects for local and national markets, Century Papers (serving Tennessee and Mississippi west to Colorado, Arizona, Texas and Mexico) expects a growth rate of 3% in 1986. This forecast is encouraging in light of the current slowdown in our traditional markets caused by the ripple effects of falling oil prices on related industries such as retailing, housing, tourism and entertainment. In addition, many businesses are curbing capital spending as they evaluate the possible effects of proposed Congressional budget cuts and tax reforms. A falling dollar will prove a positive force in this economy, increasing U.S. exports and stimulating a stagnant Gulf Coast shipping industry.

These divergent factors will necessitate changes in 1986 in the operations and marketing methods of paper merchants in the direction of reducing costs and improving services while increasing market share. Physical distribution procedures, which have remained virtually unchanged in 40 years, must be revised, and management information systems must support accelerated turnover of inventory and receivables. Century's marketing plans for 1986 will continue to feature promotion of "proprietary" products over commodity items, and continued emphasis on training.

As part of a growing trend, undercapitalized or independent distribution firms will be acquired and consolidated by stronger companies. Mergers between manufacturers and be-

tween merchants are dramatically changing traditional lines of distribution.

In any event, we expect that paper merchants will improve their performances in 1986 over 1985 levels. As professionals, we must draw upon our extensive experience and prepare to meet head-on the challenge of today's changing market structure. Century Papers is ready and able to meet these challenges in the coming decades.

Positive Outlook for Specialty Packaging in Chicago Area

*by Francis J. Houlihan, president
Fleetwood Paper Company
Franklin Park, IL*

Changes likely to affect our business in the year ahead are related to the importation of basic products which have been packaged abroad or will limit the amount of packaging used on domestic products. The more imports, the less packaging required for domestically manufactured products. Fleetwood Paper Company is an industrial packaging distributor and a designer of specialty packaging. Product lines include coated papers, films and foams or a combination of these products for use in protective packaging.

Extending credit to customers has always been a major concern of distributors, and it appears that this will become even more complex in the coming year. Just-in-time inventory, which is a trend in industry today, requires the distributor to maintain larger inventories in his warehouse to service the customer. From a credit position, the distributor then has to extend himself beyond his normal limits. When the merchandise is of a specialized nature, the distributor is liable for the outstanding balance of receivables plus remaining inventory.

Even though the economy appears to be stable, a large number of companies are still going out of business each year without any warning. Also, the trend toward industry mergers and acquisitions by large corporations leaves fewer small to medium size companies for competition. Their power is greater, with fewer choices of suppliers.

Fleetwood's trading gallery is primarily the Chicagoland area. Basically, we find our strength is in solving problems which exist in a prospective customer's packaging. We see our future (and the survival of the industrial paper



Herschel G. Maltz



Francis J. Houlihan

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Who Will be Doing the Forecasts of the Future?



Last month my message was concerned with what we are doing to develop our people, within our own companies and throughout our industry. In this issue we have the opportunity to read the forecasts for 1986 as viewed by a few of the volunteer leaders of NPTA. The leadership characteristics of these authors have been developed through time with outstanding effort on their part and with excellent mentoring by others. Most certainly, each one can look back at several valuable learning experiences that helped bring them to the forefront of our industry.

We owe our thanks to the authors who have shared with us their outlook for 1986. These forecasts, each in their own way, add to our own experiential knowledge and help us gain a clearer perspective for 1986. Looking beyond 1986, who will be doing the forecasting? Who will be the new and developing leaders of our industry?

Are your education and training programs strengthening the abilities and encouraging the talents of your people? Is your leadership example such that at some point in time others will be able to look back and say you offered them the opportunity for a great learning experience? In short, are you using your leadership today to build leaders for tomorrow? Are people a significant part of your forecasting?

Richard W. Abrams
NPTA Chairman



Lawrence C. Pollock

distributor) as becoming as specialized as possible, recognizing our strengths, and working in those specific areas. It has been our experience that anytime we stray from the flexible industrial packaging area, we become ineffective. Because of our expertise in this area, we are aware of the ever-changing needs for unique packaging requirements.

We feel fortunate that we have developed our field of expertise in the industrial packaging market because of the ever-changing need for this type of service. Our outlook for 1986 is very positive, and economic fluctuations are not of great concern, as we feel that there is a tremendous potential in specialty packaging in our market. The surface has just been scratched, and we know from experience that new opportunities are developed from extra efforts on our part. We are very excited about the new projects which we have undertaken and are just beginning to show results. We feel that this type of business takes one to four years to develop, but that is also our strength.

Good Management is Required in 1986

by Lawrence C. Pollock, president,
Pollock Paper Distributors
Dallas, TX

In a broad view, after reading many predictions of what this year will bring, it appears to us that the probability seems to indicate a slower growth curve in our area. Some of the bloom is "off the rose," caused by a variety of factors which are already on the record. Because the probability is for a continuing slow down in the rate of inflation, the opportunity to improve real profitability is there, which is the emphasis that we will want our managers to focus on in 1986.

Our objective will be to improve the quality of our customer base—accounts receivable, account evaluation and account contribution. First, we plan to monitor and improve our receivables both in days of sales outstanding (size) and in percentage past due (quality). Our assessment of economic indicators is that many of our customers will encounter cash flow problems next year and an above average number of them will declare bankruptcy. Several areas in Texas have not fared well during the last few years and they are all located in our trading area.

We plan to continue our account evaluation program which is aimed at identifying the real growth potential accounts. Some accounts in our present ledgers do not meet this test; they will be de-emphasized both by our salespeople and the branch locations.

Performance is felt to be the keyword here and our outside sales efforts will be directed principally to the best accounts with the strongest growth potential. We do not feel that we can afford to do otherwise.

The final area is similar, but it has to do with account performance—profit contribution. We all have accounts with good growth potential, but unfortunately, this does not insure they are being good profit contributors. The main thrust of our management training is being directed to this one end. Each account will be closely evaluated and the areas of sub-standard performance identified. This will be done with the salesperson and if corrections cannot be effected in a reasonable time, the account will be removed from his ledger. Again, the need for above average production by our salespeople is considered basic to the companies' success in 1986.

Hopefully, next year will be one of the strongest ever and it certainly holds that promise for the distributor who focuses on account profitability and company performance. We look forward to this new year with optimism, tempered by a bit of realism—and it will require good management to achieve the desired results.

Going Online with Customers to Automate Procurement

*Gene Shelton, president
Sunclipse, Inc.
Montebello, CA*

Sunclipse, Inc. and its Kent H. Landsberg distribution divisions look forward to 1986 with positive expectations. Although uncertainties exist, such as the dollar and how its adjustment vis-a-vis other currencies will affect the paper export market, and what form and structure new tax laws (if any) will take, we feel our strengths position us well to take advantage of an economy we expect to perform with an ever upward bias throughout the year.

At Sunclipse, we feel our greatest asset is our people. Their innovative ability enables us to respond to changing situations and to seek out new markets and penetrate them effectively. In 1986, our focus will be on consolidating where necessary, realigning toward more efficiency and welcoming prudent expansion opportunities.

As corporate America recognizes the emergence of the "service" society, distribution as we know it today will change greatly. Tele-marketing and direct mail marketing will increase, total computerization will become the norm. Our computers will allow us better response time and provide us tighter inventory organization and do many other things, but perhaps our most exciting expectation for them is that they will communicate with our customers' systems to establish a truly automated procurement and supply system.

We believe that technology is the future and that the future must be addressed now. To recognize coming trends and prepare for them is the opportunity for a business that will grow and prosper in the years ahead. Our people and our experience leave us well positioned to do that. We expect 1986 to allow us to reach new sales and profit goals as we have in eight of the last nine years.

People, Computers and Safeguarding Against Dishonesty in 1986

*by Herbert Ginsberg, president
Grayco Products Corporation
Westbury, NY*

The increasingly important problem of employee dishonesty through computers should be addressed by all of us in 1986.

With more and more of our firms coming "on-line," management should have clear-cut plans to inhibit dishonesty. With our increased use of sophisticated computer devices and programs, internal controls must be established using time-tested, past procedures and at the same time incorporating new ideas in computer management to stave off incursions from the ever more clever potential perpetrator.

Employee dishonesty, it is said, can be more dreaded than fire. The presence of fire is known almost immediately and can be subdued before much damage is done. Dishonesty, however, is frequently discovered only after a substantial loss has taken place. The "silent partner" can bring a firm to the brink of insolvency. There is no immunity from embezzlement; "trusted employees," or not.

Computer statistics should be logged and printed on a regular basis to examine who is doing what, in what program and at what specific time and day it is done. Plans of organization should establish lines of authority.

These printed records and forms are most necessary together with the sound practice in the division of duties, preventing any one person from being able to handle a transaction from beginning to end.

Polygraph testing and the scrupulous checking of personal references will help to eliminate applicants of poor character and will aid in the observance of in-place procedures. The constant supervision and enforcement of your plan and procedures are essential if success is desired. Your firm's fidelity and surety carrier can be a most valuable source of information to formulate a plan for your business. Your software house can assist you in the division of your programs, screens, and access codes to prevent incursions by unauthorized personnel who think they are "authorized."

Too often many of us plan ahead for sales and profits alone. Let us plan ahead for protection from unauthorized incursions with our use of sophisticated electronic devices in 1986.



Gene Shelton



Herbert Ginsberg

Mime...A Marketing Tool That Sells

When you are considering how best to enliven and make memorable a sales meeting or training program, have you ever thought of using mimes? When you are opening a new territory and you want to gather prospective customers or press to listen to your statistics and the reasons you are the supplier to deal with or promote, have you looked into how mimes can help create a happily captive audience? When you are represented at a trade show and you want to draw buyers' attention to your booth, or you want to make an affair particularly festive to honor an individual or group, have you weighed the contribution mimes can make toward your success?

Timex, Faberge, Pan Am, General Host, Famolare, and Allercrème are among those corporations which have recognized mime's unique ability to deliver the message their particular situation demanded. They are among the major organizations that have been using the services of a theatrical mime company, the New York Pantomime Theatre. The NYPT has a division, PromoMime, that tailors its programs to the aims and budgets of industry.

Why mime? Why is it uniquely effective? Of course, mime has novelty value. Mimes can create invisible but nonetheless real objects in space. Mimes can stride across the earth or climb to the moon while physically confined to one small area. This kind of movement has always held a peculiar fascination for virtually everyone, no matter how sophisticated or naive.

But novelty is perhaps mime's least important contribution. The most obvious element of mime—so apparent it

is frequently overlooked—is that mime is the only theatrical art that does not need words. This means that your company's words—your presentation, your sales pitch, your training information—is heard, reinforced, made unforgettable, exciting, and fun.

It has been demonstrated over and over again that the mind grasps and retains data best in pleasurable circumstances when attention is given willingly and when the message reaching the ears is emphasized by a visual stimulus that is accepted enthusiastically. Further, the concentration a top mime brings to a performance enhances the focus of the audience on the point the event is making. Whether the treatment is elegant or comic, it is surprising, and always engrossing.

Using the Mime Approach

Let's look at a few examples to understand how and why mime works so well, bearing in mind that every project could have been modified for the purposes of the paper industry.

Timex Corporation had space in a trade show at the New York Hilton. The company wanted to attract the major buyers and press away from the other exhibitors to show off its new line of watches without competition. Timex began with a lavish cocktail party in another hotel nearby, the Plaza, but the bait was a promised performance of the New York Pantomime Theatre. What the audience got was a half-hour production with seven mimes, two narrators, music and projections.

The first half was a light-hearted, hilarious history of timepieces. In 15 minutes and a dozen costume changes, it took the spectators from caveman days until Timex was born, and then went into the sell for the new line. The climax was "Today Timex times the world...tomorrow, the stars!" The audience did more than laugh from beginning to end. It stayed to place orders or interview the executives. Timex and its public relations and advertising agencies could not have been more pleased with the results.

Allercrème decided to expand into a new territory, the Northeast, from its base





in Texas. To introduce its cosmetics line, all the members of the press dealing with beauty were invited to a breakfast at the Plaza. The Allercreme executives were afraid—and rightly so—that the prepared talk was so boring the reporters would take to their heels immediately after the last course. Allercreme turned to mime. The first thing the mime company did was rewrite the speech for the ear, keeping the sense of it intact. A mime script was developed that gave visual emphasis to every point. When the speaker quoted statistics, five mimes paraded the numbers on signs and rejoiced. When the speaker praised Allercreme's history and products, the mimes dramatized the scenes and were awe-stricken at the splendor of it all. Not one press rep left. At the finish, they literally cheered the speaker as well as the mimes.

Kelly Service—the Kelly Girl temporary office help people—held a national sales meeting in Detroit. A new piece of equipment was introduced, the "Kelly Key," on which all typists were to be trained in the future. The company showed a training film in which a female mime, dressed in a variety of period costumes,

labored over out-dated office equipment and then demonstrated graphically how the Kelly Key works to guarantee the efficiency of any employee Kelly sends out.

General Host held a week-long sales conference in Tarpon Springs, FL for the top brass of its subsidiary food corporations. The high point was the final dinner with a 30-minute performance to top it off. Two mimes, backed up by a narrator and music, presented a satiric history of food in which, to the delight of the executives, their products were included.

When Pan Am gave a luncheon to honor its ex-stewardesses, four mimes plus a musician offered a comic review of life in the air, "Coffeé, Tea or Me," which drew laughter of recognition from the guests and praise from the head of Pan Am on the dais.

Each of these mime presentations was created to make something sparkling, gain attention, and be effective out of what could have been a routine, prosaic event. Why not let the very special qualities of mime work for your next sales meeting, training program, or reception?

by Muriel Broadman

Industrial Paper Sales Compensation



National Paper Trade Assn., inc.
111 Great Neck Road
Great Neck, NY 11021

Please send me _____ copy(s) of
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Growth of 2% Annually Forecasted for Mill Capacity

The ability—and the willingness—to improve machines and/or change product lines could very well be the key to maintaining a healthy manufacturing facility amidst changing market conditions. For some manufacturers of newsprint, unbleached kraft packaging paper, paperboard and bleached sulfate market pulp, converting to the production of a completely different end product may be the only way to continue cost-efficient operations.

The American Paper Institute's annual paper, paperboard and wood pulp capacity survey indicates that the total capacity for paper and paperboard is expected to be 78.8 million tons in 1988 compared with 74.3 million tons in 1985. The increase represents an annual average growth rate of 2%. Wood pulp capacity will reach a total of 60.7 million in 1988 as compared with 1985's 58.6 million capacity, an annual average growth rate of 1.2%.

Pulp's lower growth rate—as compared with paper—reflects the planned increases in integration of existing market pulp capacity as well as expanded use of recycled fiber. While capacity to produce market pulp experienced a significant 427,000 ton increase in 1985, it is expected to lose 133,000 tons from 1986 through 1988. But, the projected growth patterns for individual product grades should vary considerably over the next three years.

Wood Pulp

Future growth in capacity for sulfate pulps which, in the last ten years, has grown from a 67% to a 75% share of all wood pulp, will proceed at a modest rate, averaging 1.2% annually through 1988. The increase will trail the 2.5% average growth rate of the last ten

years as well as the rates of expansion of paper and paperboard products that constitute their end use.

Newsprint

The last new newsprint machine in the U.S. went on-stream in 1983. For the second year in a row, no significant gain in capacity for newsprint is expected. Miscellaneous increases, totaling only 53,000 tons, are reported for 1986 through 1988.

Canadian mills, which manufactured 58% of all newsprint consumed in the U.S. in 1984, are also reporting modest capacity increases. A recent Canadian Pulp and Paper Association survey reports net capacity gains of only 198,000 annual tons between 1986 and 1987. On the basis of the U.S. and Canadian surveys, North American newsprint capacity in 1987 is estimated at 16,873,000 tons.

World Economies	1984	1988	Percent Increase
WORLD TOTAL	212,761	230,519	8.3
DEVELOPED MARKET ECONOMIES	166,023	180,081	8.5
NORTH AMERICA	83,129	88,904	6.9
U.S.	67,581	72,494	7.3
Canada	15,548	16,410	5.5
JAPAN	23,495	25,169	7.1
WESTERN EUROPE	54,729	60,574	10.7
E.E.C.	28,538	31,809	11.5
Nordic countries	17,055	19,205	12.6
Rest Western Europe	9,136	9,560	4.6
OCEANIA	2,894	3,160	9.2
OTHERS	1,776	2,274	28.0
DEVELOPING MARKET ECONOMIES	20,151	23,267	15.5
AFRICA	1,020	1,145	12.3
LATIN AMERICA	11,183	12,897	15.3
of which: Brazil	3,096	3,665	18.4
Mexico	4,228	4,950	17.1
ASIA	7,948	9,225	16.1
CENTRALLY PLANNED ECONOMIES	26,587	27,171	2.2
of which: USSR	14,000	14,000	—

Source: Food and Agriculture Organization of the United Nations, U.S. capacity-American Paper Institute.

Printing and Writing Papers

Continuing the past trend of expansion, producers report plans for strong gains in printing and writing paper capacity. Seven new paper machines and several planned conversions of existing machines from the production of other grades are scheduled to come into operation in the years 1986 through 1988. Almost 2.5 million tons of new printing and writing paper capacity are reported for these years, showing an annual average growth rate of 3.9%. This gain should bring the potential annual production of printing and writing papers to 22,935,000 tons in 1988.

Uncoated free sheet papers and coated papers, the major printing and writing grade categories, will account for almost all new capacity gains and will grow at annual rates averaging 4.0% and 5.2% respectively.

Paperboard and Kraft Packaging Paper

Unbleached kraft paperboard capacity in the three years ahead is estimated to grow 1.6% per year. During the last ten years, the annual rate of growth was 2.5%. Meanwhile, producers of solid bleached and recycled paperboard plan to expand capacity at rates averaging 3.1% and 1.7% annually, and both of these rates of expansion are considerably higher than those achieved during the preceeding 10 years.

The already established decline in unbleached kraft packaging paper capacity will continue as major facilities are taken out of production and modified to produce other grades.

"These conversions supplement the more customary capacity gains from both new mills and new machines, and from improvements to existing plants and permit the industry to maintain capacity growth deemed consistent with demand for specific products," said Norma Pace, API's senior vice president.

In a well established trend, the South Atlantic and East and West South Central regions of the U.S. continue to play a major role and in 1984, accounted for 50% of all U.S. paper and paperboard capacity. In wood pulp capacity, the region is even more dominant, providing 70% of all the U.S. manufactures. Between 1985 and 1988, these regions will increase their share for paperboard and will provide 70% of all new expansion, including virtually all kraft paperboard and most new tissue capacity.

The Central region, during these years, will increase capacity share for semi-chemical paperboard with 78% of all new capacity, and for wood pulp with 20% of total additions. The

Paper and Paperboard Capacity Summary Annual

Practical Maximum Basis
Thousands short tons

GRADES	1984	1985	1986	1987	1988*
TOTAL ALL GRADES	75,943	76,696	78,158	80,063	81,125
Total Paper & Paperboard	73,098	74,304	75,803	77,708	78,768
Total Paper	37,106	37,577	38,200	39,327	40,069
NEWSPRINT	5,851	5,820	5,825	5,850	5,873
PRINTING WRITING & RELATED	19,890	20,470	21,189	22,343	22,935
Uncoated Groundwood	1,704	1,644	1,625	1,633	1,634
Coated Groundwood	3,766	3,907	4,116	4,385	4,534
Coated Free Sheet	2,791	2,815	2,868	3,116	3,300
Uncoated Free Sheet	10,058	10,562	11,030	11,631	11,868
Cotton Fiber	181	188	187	192	193
Thin Papers	338	330	330	330	330
Solid Bleached Bristols	1,051	1,023	1,032	1,056	1,075
PACKAGING & IND. CONV.	6,088	5,950	5,741	5,592	5,643
Unbleached Kraft	3,972	3,862	3,619	3,423	3,439
Bleached Packaging & Ind. Conv.	599	552	576	580	581
Specialty Packaging	549	541	534	542	542
Special Industrial	968	996	1,011	1,047	1,080
TISSUE	5,276	5,338	5,446	5,543	5,619
Total Paperboard	35,992	36,726	37,603	38,381	38,699
UNBLEACHED KRAFT	17,834	18,068	18,370	18,739	18,954
of which Kraft Linerboard	16,565	16,780	17,090	17,446	17,596
SOLID BLEACHED	4,185	4,375	4,664	4,761	4,792
SEMICHEMICAL	5,252	5,415	5,493	5,612	5,636
RECYCLED	8,722	8,869	9,077	9,268	9,317
Total Construction Paper & Board and Other	2,845	2,392	2,355	2,356	2,357

*Capacity additions presented here for 1988 include only presently known commitments and do not necessarily represent final expansion plans of the industry for that year.

Totals not adjusted for rounding differences.

Source: American Paper Institute

Western region will achieve gains in capacity for recycled paperboard and printing and writing papers, while the Northeast will lose capacity share in each of the major grade categories.

Overall, the consumption of wood pulp, recyclable paper and other vegetable-based raw materials for papermaking should decline. Similarly, pulpwood consumed in the manufacture of wood pulp should also decline. These reductions reflect expected cutbacks in the production of paper and paperboard for 1985 as a whole. Producers do anticipate a return to more normal consumption levels in the next three years.

The New Paper Merchant Sales Report: The Monthly Market Barometer

What would it be worth to a typical paper merchant to have an ongoing monthly indicator of his sales and asset management? How valuable would it be to track his performance versus other printing or industrial paper merchants, nationwide and by region? And what would he have to do to get this kind of vital day-to-day operating report?

The answer lies with NPTA's *Paper Merchant Sales Report*, published monthly in *Management News* magazine. There are a host of benefits for the paper merchant:

- It is timely.
- It is free of cost as a member service.
- Key sales, receivables and inventory statistics vital to every merchant operation are included, by printing and industrial paper classification.
- It is completely confidential (company ID numbers are used on survey forms—not company names).
- It is valid and representative. Over \$2.1 billion in industrial paper sales annually and \$5.3 billion in printing paper sales annually are represented by participants.
- All regular survey participants are sent a special early mailing of the report, received 1-2 weeks earlier than in *MN*.

Improvements for 1986

NPTA has devoted considerable time and efforts to improving the Sales Report for 1986. A completely new computer

software program was developed and thoroughly tested during 1985. It will provide greater flexibility in processing data, increased reliability and representation and a faster production turn-around time.

Several NPTA reporting regions have been restructured to make the statistics more meaningful for merchants. Twelve regions will be tracked, versus 10 last year.

New Region #4 includes: OH, MI, WV, KY and new Region #8 includes: WI, IL, IN, MO. New Region #9 states were originally included in Region #6. These states are: AK, WA, OR, ID.

The greater the number of companies participating in the program, the more refined NPTA can make these regions, zeroing in on specific cities (NY, Chicago, Los Angeles metro areas now calculated). The Association constantly evaluates these regions to ensure that they meet the needs of merchants operating within them.

Another improvement is the ability to calculate state statistics at year-end. These can then be compared with government information from the Census of Wholesale Trade (published every five years, last done in 1982) to track changes in sales growth and market share by state.

A sample of the new sales report appears in this article. Note the addition of new regions 8 and 9 (Midwest, Pacific Northwest).

(See sample report on page 25.)

Why NPTA Members Should Participate

If more companies participate in the monthly sales report survey, the sales, receivables and inventory measures cal-

Paper Merchant Sales Report Information

- ☐ Yes, I'd like to participate in the monthly sales report survey. Please issue my firm a confidential ID number and begin sending surveys to: (key contact's name and address).

- ☐ I have some questions and need more information. Please call me.

Name _____

Company _____

Address _____

City _____ State _____ Zip _____

Phone () _____

- ☐ Let me know if my firm participates now, I'm not sure. (Fill out address section above).

culated become more representative of actual market conditions. This makes the report more valuable to the company executive and the industry in general. Also, as participation builds in specific regions, new "metro/city" regions can be developed, focusing on specific trading areas.

By participating on a regular monthly schedule, members automatically receive a free "early mailing" sooner than

non-participants.

Confidentiality of information is assured by the use of special ID codes—the company name never appears on the survey form sent to NPTA.

To find out more about the program, and learn how to participate now, please complete the coupon on page 24 and send to: John LaRosa, director of research, NPTA, 111 Great Neck Road, Great Neck, NY 11021.

ACTIVITY JANUARY 1986

PAPER MERCHANT SALES REPORT

NPTA Region	Sales Per Selling Day January 1986 Compared To January 1985	Sales Per Selling Day January 1986 Compared To January 1985	Sales Per Selling Day 1986 Year-to-Date Compared To 1985 Year-to-Date	Days Outstanding Accounts and Notes At Close of January 1985 1986	Calendar Day Cost* of Ending December Inventory 1984 1985
INTERNATIONAL					
1	+ 3.9	+ 7.1	+ 5.9	43 41	58
2	- 2.6	- 2.5	- 1.4	36 36	50 50
3	+ 3.4	+ 5.1	2.6	36 40	59 67
4 MODIFIED	- 2.2	- 3.9	- 1.4	38 37	58 52
5	+ 3.5	- 5.9	+ 5.4	35 33	54 54
6 MODIFIED	- 1.5	- 6.5	-	40 42	—
7	- 0.7	- 2.0	- 3.4	41 37	50 54
8 NEW FOR 1986	- 4.1	- 3.0	- 3.3	35	60
9 NEW FOR 1986	+ 0.2	+ 9.8	+ 10.5	37	58
NY	+ 12.6	+ 4.3	+ 10.0	47 49	—
Chicago	+ 5.7	- 3.7	—	45 39	—
LA	- 5.8	- 0.3	—	48 54	—
US	+ 6.3	- 1.7	+ 3.9	39 39	54 55
EUROPEAN					
1	- 4.8	- 0.9	+ 4.5	51 53	—
2	- 1.5	- 3.2	- 3.3	45 45	60 60
3	+ 5.2	- 0.4	+ 6.5	43 44	72 81
4 MODIFIED	- 3.7	—	+ 5.1	39 48	65 65
5	+ 4.6	- 1.4	+ 0.7	44 45	73 70
6 MODIFIED	- 4.8	- 5.2	—	31 49	— 63
7	- 4.0	- 8.0	- 1.4	42 40	66 76
8 NEW FOR 1986	- 5.1	- 6.1	- 0.8	43	66
9 NEW FOR 1986	+ 6.8	- 4.7	+ 2.1	42	60
NY	+ 3.5	- 9.9	+ 0.3	41 40	—
Chicago	- 2.2	- 4.8	- 5.3	42 44	—
LA	- 5.3	- 4.4	+ 3.5	46 44	78 75
US	- 1.0	- 3.6	+ 2.1	44 44	69 69

*To calculate monthly inventory turnover, divide 365 calendar days by # of calendar days cost. e.g. $365 \div 71 = 5.099$
Insufficient data to calculate valid number.

Region 1: CT, ME, MA, NH, RI & VT
Region 2: DE, DC, MD, NJ, NY & PA (excluding NY Metro)
Region 3: AL, FL, GA, NC, SC, TN & VA
Region 4: OH, MI, WI, KY
Region 5: CO, IA, KS, MN, MT, NE, ND, SD, WY
Region 6: UT, AZ, NV, NM, CA, HI (excluding LA Metro)
Region 7: AR, LA, MS, OR & TX
Region 8: WI, IL, IN, MO (excluding Chicago Metro)
Region 9: AK, WA, OR, ID
NY Metro: NY, New York City, Long Island and Westchester Co., NJ, Counties of Bergen, Essex, Hudson, Middlesex, Passaic and Union

Chicago Metro: IL, City of Chicago and Cook, DuPage and Lake Co.; IN, Lake Co.
LA Metro: Cities: Los Angeles, and San Diego, Counties: Los Angeles, San Diego, Orange and Ventura, (and neighboring parts of Riverside and San Bernardino)
Selling Days
The actual number of days a firm was open for business or that the sales people made customer calls (calendar days less weekends (if applicable) and holidays). By supplying selling days of each firm, the sales per selling day are standardized according to actual business conditions or company policies.

Days Outstanding
The number of days outstanding on this report are calculated by adding the current month's sales and the previous month's sales and dividing the total by the number of calendar days of the two months. The result is a figure representing average sales per calendar day.
The total figure provided for closing accounts and notes receivable is divided by the average sales per calendar day. The result is the number of days outstanding at the end of the month being prepared.

GROWTH STRATEGIES



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Research Foundation
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Great Neck, NY 11021

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plus \$2.00 shipping and handling
for industry suppliers.

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For International Mailing: \$40.00
plus \$4.00 shipping—please en-
close check (all funds in U.S.
dollars drawn on a U.S. bank)

Name _____

Title _____

Company _____

Street Address _____

City _____

State _____

Zip _____

NPTA Salutes 43 Companies That Joined in 1985

The National Paper Trade Association rolled out quite a healthy list of new members in 1985. "We're very pleased that these fine companies have realized the benefits of membership in NPTA," said John J. Buckley, Jr., president of the Association. "The strength of our organization comes from the membership," he said, "and I am happy to report that NPTA has the greatest number of firms as members in its history."

The growth in membership is clearly a result of greater services provided to the industry. "We have been in the service business for 83 years," said NPTA's director of membership services Richard J. Lerman. "Our portfolio of seminars, conferences, books, periodicals, industry trend analyses, reports and other specialized services to the paper distribution industry has made us the focal point for companies seeking information that will help them operate their businesses more economically and profitably."

Trial Member Program

Many of the companies from around the country that joined NPTA in 1985 did so through the Association's "Trial Member Program." Launched for the first time in 1983, this program introduced paper distributors to the value of NPTA services for a six month period. During that time, they had a chance to "see for themselves" what NPTA is all about.

There are currently 32 companies participating in the trial member program. "It is our hope that they will take this time to evaluate NPTA, its services to the industry and the management support we provide" Lerman said.

New Members in 1985

"A" Sales, Inc.
1955 Dallas Trade Mart
Dallas, TX 75207
Jerry Burnet, President
established: 1973
type: dual

Access Paper & Converting
9570 E. 55th Street
Countryside, IL 60525
Larry E. Boals, President
established: 1984
type: printing

American Fine Paper
103 W. College Avenue
Suite 1103
Appleton, WI 54911
David S. Grayson, President
established: 1981
type: printing

Richard Bauer & Co., Inc.
627 West 42nd Street
New York, NY 11238
Joseph Hofheimer, President
established: 1916
type: dual

Bellerive Paper Company
5826 South Broadway
St. Louis, MO 63111
Harry W. Tretter, Jr., President
established: 1982
type: industrial

H.T. Berry Company Inc.
50 North Street
Canton, MA 02021
Henry T. Berry, President
established: 1968
type: industrial

Capital City Paper Company

1212 Stevenson Drive
Springfield, IL 62708
Bob Bunn, President
established: 1912
type: dual

Carolina Retail Packaging, Inc.
711 E. Main Street
Lexington, SC 29072
Vincent D. Egan, President
established: 1973
type: industrial

Classic Packaging Corp.
1-2280 Tyner Street
Port Coquitlam, BC V3C 2Z1
B.W. Palmer, President
established: 1979
type: industrial

Communication Paper Corporation
1845 New Highway
Farmingdale, NY 11735
Stephen E. Obletz, President
established: 1973
type: printing

Fidelity Paper and Supply Corp.
5 Lawrence Street
Bloomfield, NJ 07003
Pierre Guariglia, President
established: 1957
type: industrial

Hope Dispensing Systems
207 E. Buffalo Street
Milwaukee, WI 53202
Samuel N. Hope, President
type: industrial

Image Supply Inc.
2114 N. Cedar Street
Lumberton, NC 28358
David L. Edge, President
established: 1976
type: industrial

J. M. Sales, Inc.
2969 N.W. 77 Avenue
Miami, FL 33122
James R. Meade, President
established: 1975
type: dual

Katzke Paper Company
2495 S. Delaware Street
Denver, CO 80223
Clarence G. Katzke, President
established: 1948
type: industrial

Krasny Supply Company, Inc.
538 Milwaukee Avenue
Chicago, IL 60622
Irving Naiditch, President
established: 1979
type: industrial

Michigan Paper Company
3155 W. Big Beaver Road #121
Troy, MI 48084
John V. Bonander, President
established: 1983
type: printing

National Paper & Packaging Inc.
70 Franklin Avenue
Brooklyn, NY 11205
Martin Schlesinger, President
established: 1979
type: industrial

North Georgia Paper & Specialty
1507 East Main Street
Blue Ridge, GA 30513
Donald J. Clements, President
established: 1984
type: industrial

Northwest Wholesale Supply Company
P.O. Box 41
Eau Claire, WI 54702
George E. Orendorff, President
established: 1929
type: industrial

Packaging & Handling Supplies
Company
3030 Springboro Road
Dayton, OH 45439
J.G. Nazarens, President
established: 1970
type: industrial

Paper Mart
5858 Corvette Street
Los Angeles, CA 90040
Marianna S. Frick, President
established: 1920
type: industrial

Paper Mills Agency, Inc.
1213 First Avenue South
Seattle, WA 98134
John F. Bradley, President
established: 1924
type: printing

Paper Sales Inc.
151 N. Rock Island
Wichita, KS 67202
Frank D. Hamrick, President

established: 1983
type: industrial

The Paper Shack & Container Stores,
Inc.
Box 5632
Bossier City, LA 71171
Lionel W. Eltis, President
established: 1976
type: industrial

Peninsula Paper Company
1991 Hartog Drive
San Jose, CA 95131
Terry A. Lofgren, President
established: 1927
type: industrial

Penn Jersey Paper Company
2801 Red Lion Road
Philadelphia, PA 19154
Thomas R. Furia, Sr., President
established: 1963
type: industrial

Polyplast Group Inc.
9210 NW 12th Street
Miami, FL 33172
Robert K. Ruland, General Manager
established: 1983
type: industrial

Porters Supply Company
208 South Pulaski Street
Baltimore, MD 21223
Norman Gilden, President
established: 1945
type: industrial

G. A. Rinn Paper Co., Inc.
1101 N. Plymouth Street
Allentown, PA 18001
Robert E. Kline, President
type: printing

River House Distributors
RD#1 West River Road North
Fulton, NY 13069
Raffaella A. Arena, President
type: dual

Rockford Wholesale Paper Company
611-613 Chestnut
Rockford, IL 61105
type: industrial

San Luis Paper Co.
P.O. Box 1859
San Luis Obispo, CA 93406
Harold Larsen, President
type: industrial

Service Paper Company
3324 Lind Avenue S.W.
Renton, WA 98055
Joe Holton, CEO
type: industrial

Spartan Paper Products
305 West Maple Avenue
Orange, CA 92666
Gary Mead, President
type: industrial

Star Paper Company, Inc.
133 Hale Street
Haverhill, MA 01830
Nicholas Peterson, President
type: industrial

Steen-Macek Paper Company
3224 Market Street
Green Bay, WI 54307
William Hayes, President
type: dual

The Stevens Company
6550 Okeechobee Boulevard
West Palm Beach, FL 33411
Louis A. Stevens, President
type: industrial

System Packaging Co., Inc.
5951 Rickenbacker Road
Los Angeles, CA 90040
Emil Halimi, President
type: industrial

Thompson Merchandising & Supply
5600 6th Avenue South
Seattle, WA 98108
Dick Thompson, President
type: industrial

Valiant Paper & Packaging Co., Inc.
75 Knickerbocker Road
Moonachie, NJ 07074
Gary S. Cohen, President
type: industrial

Wegbreit & Associates, Inc.
3420 E. Shea Boulevard
Phoenix, AZ 85028
Norman Wegbreit, President
type: dual

Whitaker Carpenter Paper Company
2651 Carl Boulevard
Elk Grove Village, IL 60007
T. Washburn, President
type: printing

**GROWING MARKET
AREAS**

According to the National Planning Association, (NPA) our country's population growth rate is slowing. While our growth rate was 1.1% from 1970-1982, all expectations are now for a 0.8% increase for the period 1982-2000. 40 States will grow more slowly than they did in the past NPA predicts. The five fastest growing states will be: Arizona, Nevada, Florida, Utah, New Hampshire.

**PAYING FOR
TRAINING**

What do you spend on the training of sales people? A recent study published in Sales & Marketing magazine reported that "industrial products" companies spent the most—\$25,700 per head in 1984. Quite a chunk of money. "Consumer" products companies were at \$17,810, a jump of 7.2% in one year. The average training period was 18 weeks.

The greatest increase was in the service sector. The figure of \$18,100 per sales person represented a 13.1% increase for this group.

CHANGE OF ADDRESS

Do not miss one issue of NPTA Management News magazine. Please notify us *prior* to your relocation so that we may change our records.

Forward changes to:
Circulation Manager
NPTA Management News
111 Great Neck Road
Great Neck, NY 11021

Change date:
☐ immediately
☐ future _____ date

Use the mailing label from the cover of this issue of MN:

Place Label Here

New address:

Name _____ Title _____
Company _____
Street Address _____
City _____ State _____ Zip _____
Signature _____ Date _____

PAPER MERCHANT SALES REPORT

NFTA Region	Sales Per Selling Day November 1985 - Compared To - November 1984	Sales Per Selling Day November 1985 - Compared To - October 1985	Sales Per Selling Day 1985 Year-to-Date - Compared To - 1984 Year-to-Date	Days Outstanding (Accounts and Notes) At Close of November		Calendar Day Cost* of Ending October Inventory	
				1984	1985	1984	1985
INDUSTRIAL							
1	- 2.2	2.4	+ 5.0	44	41	—	71
2	- 1.0	+ 6.4	- 2.8	34	35	54	47
3	- 1.2	+ 0.8	- 1.9	38	39	60	60
4	- 1.0	+ 4.2	- 3.0	34	37	55	52
5	+ 0.4	+ 2.8	+ 5.8	33	33	56	57
6	- 2.3	1.0	—	38	42	—	—
7	- 7.0	- 3.3	- 4.3	41	37	52	57
NY	—	10.1	+ 8.5	46	41	—	—
Chicago	5.5	+ 11.7	+ 0.0	37	40	—	—
LA	11.5	1.8	1.8	53	50	44	66
US	- 0.1	+ 0.2	- 0.6	39	39	54	55
PRINTING							
1	+ 8.6	+ 14.9	+ 4.5	50	52	—	—
2	- 1.5	+ 9.7	+ 3.9	46	45	60	58
3	+ 3.3	- 0.1	- 6.3	44	43	69	72
4	+ 4.1	+ 7.2	+ 5.6	44	41	60	59
5	+ 9.3	+ 0.7	+ 0.9	38	42	70	69
6	- 2.7	+ 0.3	—	39	42	—	62
7	- 3.3	- 7.0	- 2.8	41	40	66	69
NY	6.9	+ 5.0	+ 1.1	40	42	—	—
Chicago	12.8	+ 4.1	- 0.0	42	43	—	—
LA	- 0.6	+ 4.4	+ 2.6	44	42	75	77
US	+ 0.3	+ 4.6	+ 2.4	43	43	66	65

*To calculate monthly inventory turnover, divide 365 calendar days by # of calendar days cost, e.g., $365/73 = 5.00x$.

— Insufficient data to calculate valid statistic.

Region 1: CT, ME, MA, NH, RI & VT

Region 2: DE, DC, MD, NJ, NY & PA (excluding NY Metro)

Region 3: AL, FL, GA, NC, SC, TN & VA

Region 4: IL, IN, KY, MI, MO, OH, WV & WI (excluding Chicago Metro)

Region 5: CO, IA, KS, MN, MT, NE, ND, SD, WY

Region 6: AK, AZ, CA, HI, ID, NV, NM, OR, UT & WA (excluding LA Metro)

Region 7: AR, LA, MS, OK & TX

NY Metro: NY: New York City, Long Island and Westchester Co. NJ: Counties of Bergen, Essex, Hudson, Middlesex, Passaic and Union

Chicago Metro: IL: City of Chicago and Cook, DuPage and Lake Cos. IN: Lake Co.

LA Metro: Cities: Los Angeles, and San Diego. Counties: Los Angeles, San Diego, Orange and Ventura (and neighboring parts of Riverside and San Bernardino)

Selling Days

The actual number of days a firm was open for business or that the sales people made customer calls [calendar days less weekends (if applicable) and holidays]. By supplying selling days of each firm, the sales per selling day are standardized according to actual business conditions or company policies.

Days Outstanding

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The total figure provided for closing accounts and notes receivable is divided by the average sales per calendar day. The result is the number of days outstanding at the end of the month being prepared.

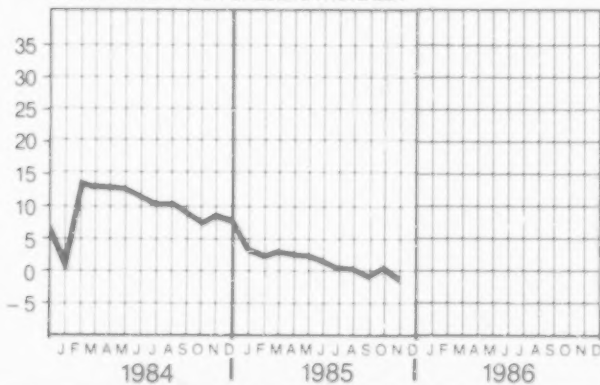
PAPER MERCHANT SALES REPORT

SUMMARY NATIONAL TREND INFORMATION: 1984 TO PRESENT

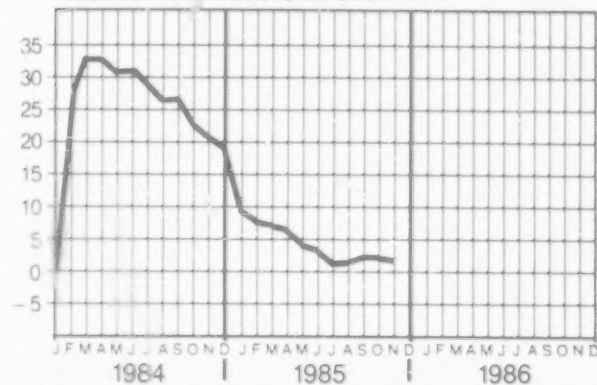
SALES INFORMATION

YEAR-TO-DATE SALES PER SELLING DAY AS A PERCENTAGE OF PREVIOUS YEAR'S YEAR-TO-DATE SALES PER SELLING DAY

INDUSTRIAL PAPER SALES NATIONALLY



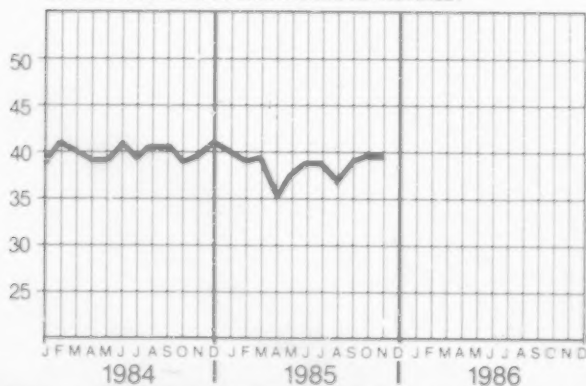
PRINTING PAPER SALES NATIONALLY



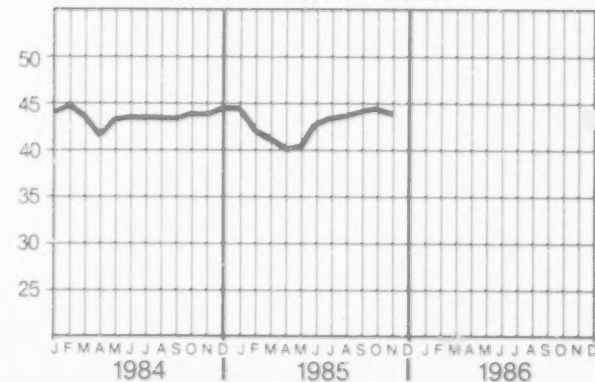
RECEIVABLES INFORMATION

DAYS OUTSTANDING—ACCOUNTS AND NOTES RECEIVABLE FROM PAPER SALES AT END OF EACH MONTH (IN CALENDAR DAYS)

INDUSTRIAL PAPER RECEIVABLES NATIONALLY



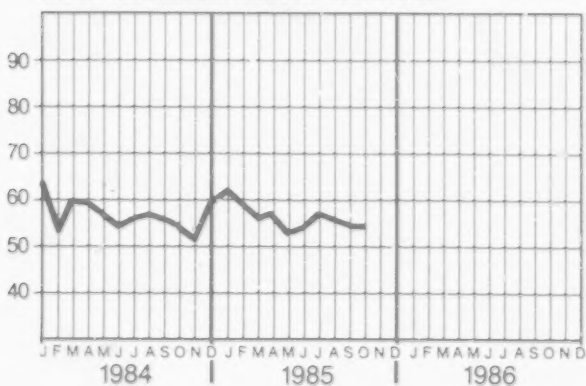
PRINTING PAPER RECEIVABLES NATIONALLY



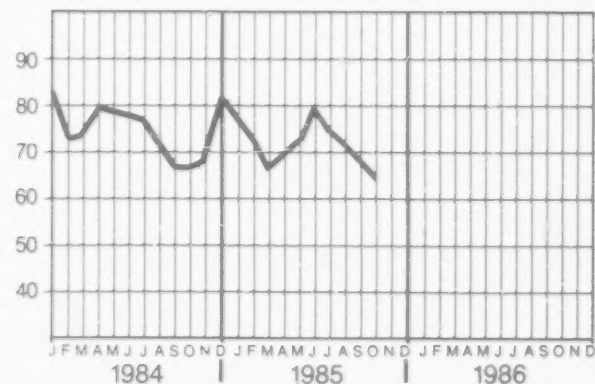
INVENTORY INFORMATION

CALENDAR DAYS COST OF ENDING MONTHLY INVENTORY (FIFO) (IN CALENDAR DAYS)

INDUSTRIAL PAPER INVENTORY NATIONALLY



PRINTING PAPER INVENTORY NATIONALLY



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- Multiple Costing in Product File
- Salesman Commission Analysis
- Product Scan Inquiry
- Last Quantity and Selling Price
- Detail Purchase History
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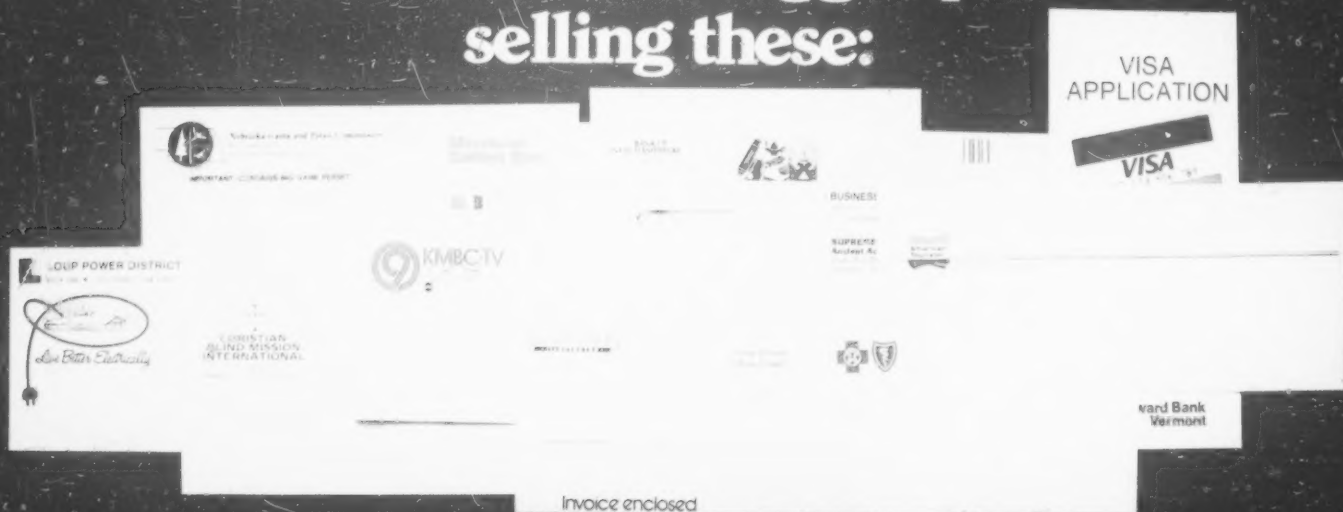


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Why settle for less when you can have more? It's as simple as that — when it comes to selling plain envelopes versus printed envelopes.

Of course, it may take a little more effort to sell the printed envelope order. But your profit will make it all worthwhile. And your customers will appreciate what printed envelopes will do for their businesses. They'll show their appreciation by placing another order. And another. And another.

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Contact a service representative at the plant nearest you to find out about our Envelope Printing Guide and our new Envelope Printing Slideshow Presentation. Both are full of helpful tips on selling printed envelopes.



New York Envelope Group
Long Island City, NY
Brooklyn, NY (Envelope Converters)
Union, NJ (Champion Envelope)

National Envelope Group
Atlanta, GA; Lenexa, KS;
St. Louis, MO; Worcester, MA

Grow with National

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